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Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Application Overview

Version 3.1, 3/31/2013
CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on <http://www.cms.gov/Medicare/Medicare.html>.

Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Application Overview course. As a reminder, you may view the slide number you are on by clicking on the moving cursor.

Additionally, you can view the narration by clicking the [CC] button in the lower right hand corner of the screen.

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Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:
<http://www.cms.gov/WorkersCompAgencyServices/>.

Slide notes

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Course Overview

- Navigating the WCMSAP
- Menu options

**Slide notes**

This course will provide an overview on how to navigate the WCMSAP and the menu options listed on the Home page.

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The screenshot shows the WCMSAP home page. At the top, there is a header with the CMS logo (Centers for Medicare & Medicaid Services) and the title "Workers' Compensation Set-Aside Web Portal" next to a COB logo. Below the header is a navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is titled "WCMSAP" and contains a yellow callout box stating: "After a successful login, the WCMSAP Home page is displayed." Below this, there is a paragraph explaining the site's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Further down, it says: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." Under the heading "I'd like to...", there are three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with five links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

WCMSAP

After a successful login, the WCMSAP Home page is displayed.

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

After a successful login, the WCMSAP Home page is displayed.

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

WCMSAP

The WCMSAP Medicare Set-Aside case information cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

The navigation menu at the top of each page gives the user access to various parts of the WCMSAP to facilitate using the application through the following menu options: "About This Site"; CMS Links"; "How To"; "Reference Materials"; and "Contact Us".

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

About This Site CMS Links How To... Reference Materials Contact Us

How To Use This Site

WCMSAP

The WCMSAP provides information on Medicare Set-Aside cases and the state of the application. View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Desionee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

About This Site navigates to the How to Use This Site link, offering general information on how to use the WCMSAP application.

Slide notes

About This Site navigates to the How to Use This Site link, offering general information on how to use the WCMSAP application.

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The screenshot displays the homepage of the Workers' Compensation Set-Aside Web Portal (WCMSAP). At the top left is the CMS logo with the text "CENTERS for MEDICARE & MEDICAID SERVICES". To its right is the title "Workers' Compensation Set-Aside Web Portal" and a circular COB logo. A blue navigation bar contains links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". Below the navigation bar, the "CMS Links" dropdown menu is open, showing "Workers Compensation Agency Services", "General Medicare", and "Coordination of Benefits". The main content area on the left features the heading "WCMSAP" and a paragraph: "The WCMSAP provides Medicare Set-Aside case information cases and the st...". A yellow callout box highlights the text: "CMS Links provides links to the Workers' Compensation Agency Services page, the Medicare Web site, and the Coordination of Benefits Web site." Below this, it states: "View Alert functions are also available. Click the desired link below to perform that function." and "You may modify Account Settings by clicking the appropriate link under the Account Settings list." Under the heading "I'd like to...", there are links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there is a "QUICK HELP" section with a link "Help About This Page" and an "Account Settings" section with links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

Slide notes

CMS Links provides links to the Workers' Compensation Agency Services page, the Medicare Web site, and the Coordination of Benefits Web site.

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

About This Site CMS Links How To... Reference Materials Contact Us

WCMSAP

The WCMSAP provides an interface for entering Medicare Set-Aside (WCMSA) proposals. You can enter case information directly. The site also provides a way to view cases and the statuses without inquiry to CMS. View Alert functions are also available. Click on the function that you want to perform.

You may modify Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

The How To... section provides detailed information on performing the functions listed in the drop down menu.

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

The How To section provides detailed information on performing the following functions:

"Getting Started"; "Requesting your Login ID"; "Requesting your Password"; "Changing your Password"; "Resetting your PIN"; "Changing your Authorized Representative"; "Changing Your Account Manager"; "Inviting Account Designees".

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

About This Site CMS Links How To... Reference Materials Contact Us

WCMSAP site User Manual

WCMSAP

The WCMSAP provides an interface for Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

[Create a New Case](#)

[Case Lookup](#)

[View Alerts](#)

QUICK HELP

[Help About This Page](#)

Account Settings

[Update Personal Information](#)

[Update Account Information](#)

[Designee Maintenance](#)

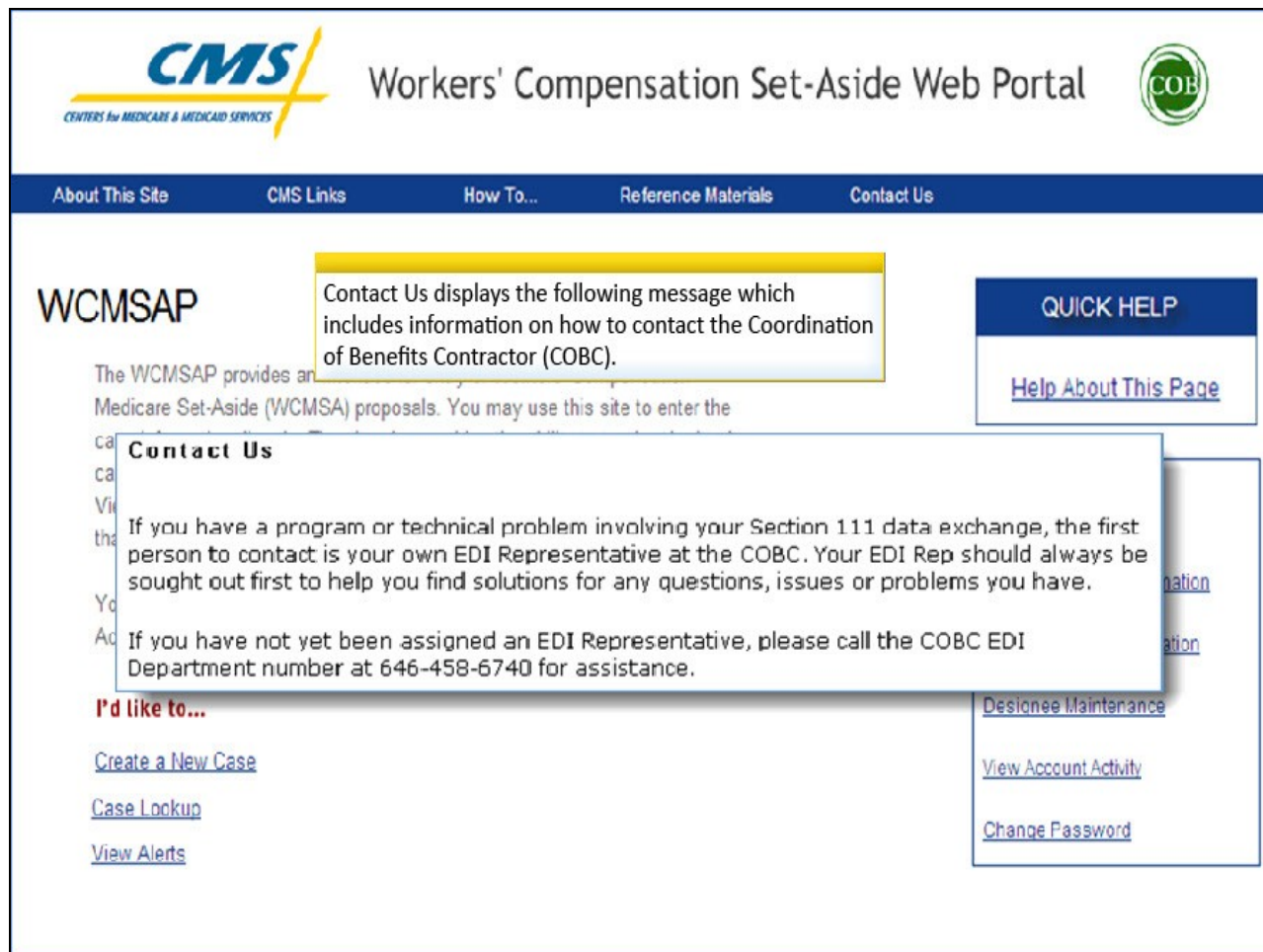
[View Account Activity](#)

[Change Password](#)

Slide notes

Reference Materials provides a link to the WCMSAP User Manual.

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

About This Site CMS Links How To... Reference Materials Contact Us

WCMSAP

The WCMSAP provides an online portal for the Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the

Contact Us

If you have a program or technical problem involving your Section 111 data exchange, the first person to contact is your own EDI Representative at the COBC. Your EDI Rep should always be sought out first to help you find solutions for any questions, issues or problems you have.

If you have not yet been assigned an EDI Representative, please call the COBC EDI Department number at 646-458-6740 for assistance.

I'd like to...

[Create a New Case](#)

[Case Lookup](#)

[View Alerts](#)

QUICK HELP

[Help About This Page](#)

[Designee Maintenance](#)



[View Account Activity](#)

[Change Password](#)

Slide notes

Contact Us displays the following message:

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**Workers' Compensation Medicare Set-Aside Web Portal**

About This Site CMS Links How To... Reference Materials Contact Us [Skip Navigation](#)

Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Coordination of Benefits Contractor (COBC) or the Centers for Medicare & Medicaid Services (CMS).

WCMSAP Messages

This space is reserved for system messages from the Coordination of Benefits Contractor. Check this location for important information regarding system outages, scheduled maintenance and special announcements.

Sign into your account

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)

GETTING STARTED

For more information, refer to How To Get Started under the How To menu option.

STEP 1
New Registration →

STEP 2
Account Setup →
(Account ID and PIN required)

Slide notes

Bulletin board messages display on the WCMSAP Welcome page. These messages keep users informed of upcoming events, maintenance or other system-specific information.

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The screenshot displays the WCMSAP web portal. At the top, the CMS logo (Centers for Medicare & Medicaid Services) is on the left, the title "Workers' Compensation Set-Aside Web Portal" is in the center, and the COB logo is on the right. A blue navigation bar contains links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is titled "WCMSAP" and includes a paragraph explaining the portal's purpose: "The WCMSAP provides a secure online environment for Medicare Set-Aside case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this, a section titled "I'd like to..." lists links: "Create a New Case", "Case Lookup", and "View Alerts". A yellow callout box points to the "QUICK HELP" link in the right sidebar, stating: "Users can select Quick Help to obtain access to on-line help documentation." The sidebar also contains a "QUICK HELP" button, a "Help About This Page" link, and an "Account Settings" section with links for "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

WCMSAP

The WCMSAP provides a secure online environment for Medicare Set-Aside case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

Users can select Quick Help to obtain access to on-line help documentation.

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The screenshot displays the WCMSAP web portal. At the top, the CMS logo (Centers for Medicare & Medicaid Services) is on the left, the title "Workers' Compensation Set-Aside Web Portal" is in the center, and the COB logo is on the right. A blue navigation bar contains links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is titled "WCMSAP" and includes a yellow callout box with the following text: "The WCMSAP provides an interface for entry of Workers' Compensation Me... Users may also view/modify Account Settings. Access to the Account Settings functions is limited by user role (i.e., whether or not the user is set up as the Account Manager or the Account Designee). For more information on the various Account Settings, see the Login and User Maintenance and Basic Functions-Account Manager CBTs." Below this, it states: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." A section titled "I'd like to..." lists links: "Create a New Case", "Case Lookup", and "View Alerts". On the right, a "QUICK HELP" sidebar contains a link "Help About This Page" and a section titled "Account Settings" with links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Me...

Users may also view/modify Account Settings. Access to the Account Settings functions is limited by user role (i.e., whether or not the user is set up as the Account Manager or the Account Designee).

For more information on the various Account Settings, see the Login and User Maintenance and Basic Functions-Account Manager CBTs.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

Users may also view/modify Account Settings. Access to the Account Settings functions is limited by user role (i.e., whether or not the user is set up as the Account Manager or the Account Designee).

For more information on the various Account Settings, see the Login and User Maintenance and Basic Functions-Account Manager CBTs.

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The screenshot displays the WCMSAP web portal. At the top, the CMS logo (Centers for Medicare & Medicaid Services) is on the left, the title "Workers' Compensation Set-Aside Web Portal" is in the center, and the COB logo is on the right. Below the title is a blue navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is titled "WCMSAP" and contains a paragraph explaining the portal's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph is another paragraph: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." To the right of the main content is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password". On the left side of the main content area, under the heading "I'd like to...", there are three yellow-bordered buttons: "Create a New Case", "Case Lookup", and "View Alerts".

Slide notes

Users of the WCMSAP can access and make changes to cases associated to their assigned Account ID(s). Account Managers have access to all associated cases, while Account Designees' case access is controlled by the Account Manager.

Case management is handled using the following functions: Create a New Case, Case Lookup, and View Alerts.

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

QUICK HELP

- [Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

Use the Create a New Case link to input Workers' Compensation Medicare Set-Aside case information and all relevant documentation.

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The screenshot shows the 'New Case Creation' page of the CMS Workers' Compensation Set-Aside Web Portal. The page has a blue header with the CMS logo and navigation links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'QUICK HELP' button is in the top right. The main content area has a yellow highlight over a text box that reads: 'When the Create a New Case link is selected, the New Case Creation page will display. The data entered on this screen will be used to verify that the case meets all new case requirements (e.g., a duplicate case does not already exist and that the proposed settlement amount is not under the threshold amount).' Below this, there is a form with fields for HICN, SSN, Initial Date of Injury, Last Name, First Name, Gender, Date of Birth, and Proposed Settlement Amount. The form also includes 'Cancel' and 'Continue' buttons.

CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

New Case Creation

QUICK HELP
[Help About This Page](#)

The information requested below will be systematically validated to ensure the Workers' Compensation Medicare Set-Aside (WCMSA) meets the criteria set for new cases. The information entered on this screen will be used to verify that the case meets all new case requirements (e.g., a duplicate case does not already exist and that the proposed settlement amount is not under the threshold amount).

Once the information is necessary, create a work file format, and if and save it to the WCMSAP. The informat

To begin the new case creation process, enter the required data and click the 'Continue' button. To cancel the case creation, click the 'Cancel' button to return to the Home page.

An asterisk (*) indicates a required field.

The Beneficiary/Claimant's Social Security Number (SSN) or Health Insurance Claim Number (HICN) must be provided. You may not provide both.

HICN: * OR SSN: * - -

Initial Date of Injury: * / / (MM/DD/CCYY)

Last Name: * First Name: *

Gender: *

Date of Birth: * / / (MM/DD/CCYY)

Proposed Settlement Amount: * \$

Slide notes

When the Create a New Case link is selected, the New Case Creation page will display.

The data entered on this screen will be used to verify that the case meets all new case requirements (e.g., a duplicate case does not already exist and that the proposed settlement amount is not under the threshold amount).

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

New Case Creation

QUICK HELP
[Help About This Page](#)

The information requested below will be systematically validated to ensure the Workers' Compensation Medicare Set-Aside (WCMSA) case does not already exist in the Web portal and that the data entered meets the criteria set for new case creation. A new WCMSA case should not be created if the beneficiary is deceased or the proposed settlement amount is under the threshold limits set for a WCMSA case.

Once the information is validated, you may, if necessary, create a work-in-progress WCMSAP. The information saved in the system will be used to create the final WCMSA.

To begin the new case creation process, click the 'Cancel' button to return to the Home page.

An asterisk (*) indicates a required field.

The Beneficiary/Claimant's Social Security Number (SSN) or Health Insurance Claim Number (HICN) must be provided. You may not provide both.

HICN: * OR SSN: * - -

Initial Date of Injury: * / / (MM/DD/CCYY)

Last Name: * First Name: *

Gender: *

Date of Birth: * / / (MM/DD/CCYY)

Proposed Settlement Amount: * \$

From the New Case Creation page, users can select Cancel or Continue. Cancel will return you to the Home page. Continue will take you to Beneficiary/Claimant Information page if the case meets the minimum requirements.

Slide notes

From the New Case Creation page, users can select Cancel or Continue. Cancel will return you to the Home page. The information entered will not be saved.

Continue will save your changes and take you to Beneficiary/Claimant Information page if the case meets the minimum requirements

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CMS Workers' Compensation Set-Aside Web Portal

Home About This Site CMS Links How To... Reference Materials Contact Us Logout

Case Information

Beneficiary/Claimant * Diagnosis Codes * WC Carrier * Employer* Attorney Notes Documents * Summary

Beneficiary/Claimant Information

An (*) indicates a field required for case submission.

Last Name: FIRST
First Name: LAST MI: M
Beneficiary HICN: *****##A
Beneficiary/Claimant ID: *****##A
Beneficiary/Claimant Name: *****##A

The following tabs will be displayed: Beneficiary/Claimant, Diagnosis Codes, Workers' Compensation (WC) Carrier, Employer, Attorney, Notes, Documents, and Summary. Each tab identifies an information page for the WCMSA case. Tabs denoted with an asterisk indicate that data is required to be entered for that page. For additional information on WCMSAP case creation, see the Case Submission CBT.

State where injury occurred: 1 - Select -
Zip Code: 1 - -
Phone: 1 - -
Submitter Type: 1 -Select-

Next Save Work-in-Progress Case Summary Cancel Case Creation

Slide notes

The WCMSAP uses the following tabbed pages to store information related to the WCMSA case: Beneficiary/Claimant, Diagnosis Codes, Workers' Compensation (WC) Carrier, Employer, Attorney, Notes, Documents, and Summary.

Tabs denoted with an asterisk indicate that data is required to be entered for that page.

For additional information on WCMSAP case creation, see the Case Submission CBT.

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions that function.

You may modify Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

The Case Lookup function is used to access and make changes to cases under an assigned Account ID(s). When a user clicks on the Case Lookup link, the Case Lookup screen will display.

Slide notes

The Case Lookup function is used to access and make changes to cases under an assigned Account ID(s). When a user clicks on the Case Lookup link, the Case Lookup screen will display.

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CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria. Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.

☒ All Cases (Both submitted and WIP cases)
☐ Submitted Cases Only
☐ WIP Cases Only

Case Control Number:
Health Insurance Claim Number:

Case Creation Date Range:
From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Case Submission Date Range:
From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

From this page, users may access cases that are associated with their Login ID using various user-specified criteria.

QUICK HELP
[Help About This Page](#)

Slide notes

From this page, users may access cases that are associated with their Login ID using various user-specified criteria.

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CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria. Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.

☒ All Cases (Both submitted and WIP cases)
☐ Submitted Cases Only
☐ WIP Cases Only

Case Control Number:

Health Insurance Claim Number (HICN): OR SSN: --

Case Creation Date From Date: (MM/DD/CCYY)

Case Submission Date From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

QUICK HELP
[Help About This Page](#)

The fields on this page can be used to narrow search results. Case listings may be requested for all cases (both submitted cases and work-in-progress (WIP) cases), submitted cases only, or work-in-progress cases only.

Slide notes

The fields on this page can be used to narrow search results.

Case listings may be requested for all cases (both submitted cases and work-in-progress (WIP) cases), submitted cases only, or work-in-progress cases only.

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CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Case Lookup

You can access Workers' Compensation Set-Aside cases through the Web portal and are able to search for cases. Enter the search criteria in the search criteria fields on this page.

☒ All Cases (Both Submitted and WIP Cases)

☐ Submitted Cases Only

☐ WIP Cases Only

Case Control Number:

Health Insurance Claim Number (HICN): OR SSN:

Case Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Case Submission Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

QUICK HELP

[Help About This Page](#)

The remaining fields are all optional but can also be used to narrow down the search results. Please see the Case Lookup CBT for more information on the Case Lookup function.

Slide notes

The remaining fields are all optional but can also be used to narrow down the search results.

Please see the Case Lookup CBT for more information on the Case Lookup function.

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The screenshot displays the WCMSAP web portal. At the top, the CMS logo (Centers for Medicare & Medicaid Services) is on the left, the title "Workers' Compensation Set-Aside Web Portal" is in the center, and the COB logo is on the right. Below the title is a blue navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is titled "WCMSAP" and contains a paragraph explaining the portal's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph, it states: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." On the left, under the heading "I'd like to...", there are three links: "Create a New Case", "Case Lookup", and "View Alerts". The "View Alerts" link is highlighted with a yellow box. In the center, a yellow box contains the text: "The View Alerts function is used to access alerts for a WCMSA case." On the right, there is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with five links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

The View Alerts function is used to access alerts for a WCMSA case.

QUICK HELP

- [Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

The View Alerts function is used to access alerts for a WCMSA case.

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The screenshot shows the WCMSAP web portal. At the top, there is a header with the CMS logo (Centers for Medicare & Medicaid Services) and the title "Workers' Compensation Set-Aside Web Portal" next to a COB logo. Below the header is a navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is titled "WCMSAP". On the left, there is a section titled "The WCMSAP" with a yellow highlight box containing the text: "After cases have been submitted, the WCRC reviews each case for completeness and accuracy. If errors have been found in a submitted case, the WCRC sends an alert e-mail to the e-mail address provided during account setup. The alert e-mail will contain the case number and the type of error found." Below this, there is a link "View Alert for that function." and a paragraph stating: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." Underneath, there is a section titled "I'd like to..." with links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

Slide notes

After cases have been submitted, the theWorkers' Compensation Recovery Contractor (WCRC) reviews each case for completeness and accuracy. If errors have been found in a submitted case, the WCRC sends an alert e-mail to the e-mail address provided during account setup.

The alert e-mail will contain the case number and the type of error found.

Most alerts are informational; however, some require action on the case. Users must read the alert and respond if necessary.

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CMS
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

I'd like to...

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

To view an Alert, click on the View Alerts link.

QUICK HELP

[Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

To view an Alert, click on the View Alerts link.

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Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status:

HICN: OR SSN: --

Alert Creation Date Range:


From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST


Slide notes

The Alert page displays. By default, this page will list all the alerts for the previous 60 days that are associated with the Account ID(s) the user registered under. Users can use the fields on the page to limit the alerts that are displayed.

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QUICK HELP

[Help About This Page](#)

Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering:

Case Control Number:
Status:
HICN: OR SSN:

Alert Creation Date Range:


From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST


Slide notes

Users have two options for viewing Alerts.

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Workers' Compensation Set-Aside Web Portal



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Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status:

HICN: OR SSN: --

Alert Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date						Bene Name
01	2010-02-15						FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****###B	FIRST LAST

They may click the Alert ID number link which will display the specific alert on the Alert Detail page.


QUICK HELP

[Help About This Page](#)


Slide notes

They may click the Alert ID number link which will display the specific alert or letter on the Alert Detail page

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QUICK HELP

[Help About This Page](#)

Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by

Case Control Number

Status

HICN: OR SSN: --

Alert Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)


They may also click a Case Number link which will display all alerts for the selected case on the Alert Listing page.

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST


Slide notes

They may also click a Case Number link which will display all alerts for the selected case on the Alert Listing page.

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Workers' Compensation Set-Aside Web Portal



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QUICK HELP

[Help About This Page](#)

Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by:

Case Control Number:

State:

HICN: OR SSN: --

Alert Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST

Please see the Alerts CBT for additional information on the various alerts that may be received for a case on the WCMSAP.

Slide notes

Please see the Alerts CBT for additional information on the various alerts that may be received for a case on the WCMSAP.

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You have completed the Application Overview course. The information in this course can be referenced by using the document at the link below.

<https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf>

Slide notes